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Technical Publications

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User/Administrator Manual for *Salesforce Communicator V.2*

Author: Zultys Technical Support Department

This document serves as the Administrator and User guide for Zultys Salesforce Communicator.

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Edition Notice

This edition applies to Version 2 of Zultys Salesforce Communicator and all subsequent releases and modifications until otherwise indicated in new editions.

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User Manual

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1 Introduction to Salesforce Communicator

1.1 Feature Description

Companies that have installed a Zultys MX IP phone system and that use Salesforce.com as their customer relationship management (CRM) system can integrate the two systems using *Zultys Salesforce Communicator*. After a call center agent installs the software, he/she can make, transfer and disconnect calls through the MX from within a Salesforce window and obtain a caller's Contact information in a Salesforce screen display. Additionally, Salesforce automatically logs the call record in its database. Valid license is required to utilize Zultys Salesforce Communicator software.

1.2 Salesforce Communicator Requirements

Following requirements must be met for Zultys Salesforce Communicator to function properly:

- Agent's computer is running 32-bit or 64-bit version of Microsoft Windows XP (with SP3), Windows 7 or Windows Terminal Server.
- Zultys Salesforce Communicator software is installed.
- Salesforce Enterprise Edition, Unlimited Edition or Professional Edition license.
- Agent is logged into ***Salesforce Enterprise Edition***, ***Unlimited Edition*** or ***Professional Edition*** using either Internet Explorer Version 8 or above, Firefox Version 11 or above, or Google Chrome Version 11 or above. Any HTML 5 capable browser should work.
- Agent is a member of a Salesforce Call Center established for Zultys. Salesforce Call Center does not have any association with MX user or call group assignment.
- Agent is bound to a phone set or a softphone. Salesforce and Salesforce Communicator do not provide 'built-in' audio device.
- For MX versions 7.0.5 and below, MXIE is required; for MX versions 7.0.7 and higher, MXIE is no longer required.

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1.3 New Features in Zultys Salesforce Communicator V.2

- Role/Group Login screen added on login to *Zultys Salesforce Communicator*, if at least one role is available.
- Ability to change *Active Role* for making outbound calls added.
- Multiple lines support.
- Bind Setting added in the Zultys Salesforce Adapter Configuration Tool.
- Park option added.
- Answer button added for incoming calls.

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2 Implementing Zultys Salesforce Communicator

2.1 Installing Zultys Salesforce Communicator

1. Download the Zultys Salesforce Communicator setup software.
2. Run the setup software to install the Zultys Salesforce Communicator on the computer (***Note: Microsoft Administrator rights are required***).
3. If an Unknown Publisher security warning window appears, click on **Run**.

Open File - Security Warning
The publisher could not be verified. Are you sure you want to run this software?
Name: ZSFASetup.exe
Publisher: Unknown Publisher
Type: Application
From: E:_ZULTYS NEW GUIDES\Zultys Software
Run
Cancel
Always ask before opening this file
This file does not have a valid digital signature that verifies its publisher. You should only run software from publishers you trust.
How can I decide what software to run?

4. The Zultys *Salesforce Communicator Setup* window opens. Click on **Next**.

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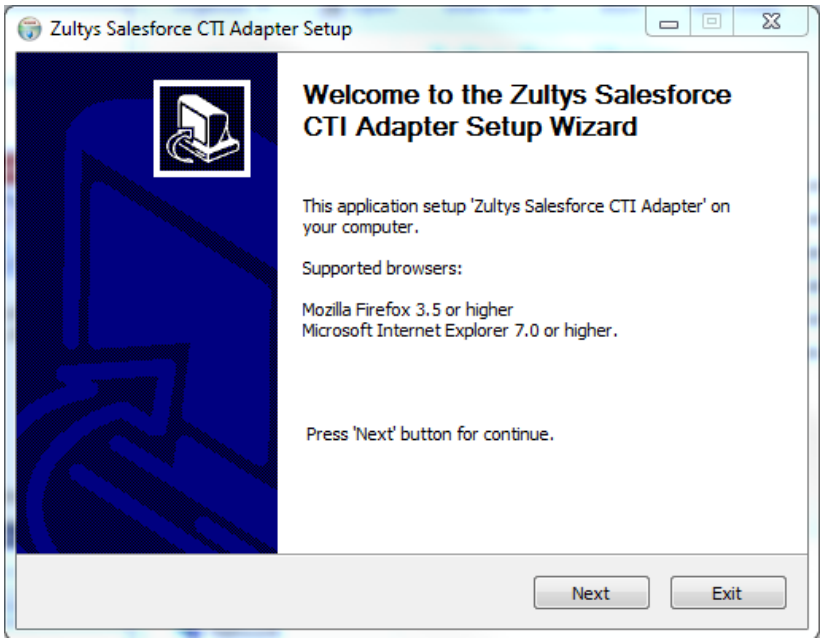
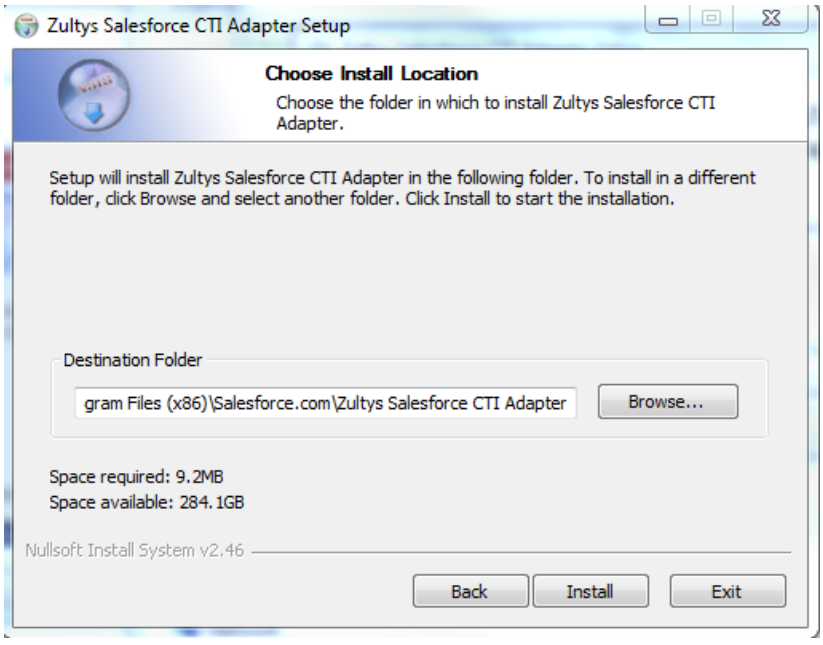

Zultys Salesforce CTI Adapter Setup
Welcome to the Zultys Salesforce CTI Adapter Setup Wizard
This application setup 'Zultys Salesforce CTI Adapter' on your computer.
Supported browsers:
Mozilla Firefox 3.5 or higher
Microsoft Internet Explorer 7.0 or higher.
Press 'Next' button for continue.
Next
Exit

5. Choose an install location. Click on **Install**.


Zultys Salesforce CTI Adapter Setup
Choose Install Location
Choose the folder in which to install Zultys Salesforce CTI Adapter.
Setup will install Zultys Salesforce CTI Adapter in the following folder. To install in a different folder, click Browse and select another folder. Click Install to start the installation.
Destination Folder
gram Files (x86)\Salesforce.com\Zultys Salesforce CTI Adapter
Browse...
Space required: 9.2MB
Space available: 284.1GB
Nullsoft Install System v2.46
Back
Install
Exit

6. A Zultys Salesforce Communicator window indicates that the Salesforce Communicator software has been installed. Click on **Finish**.

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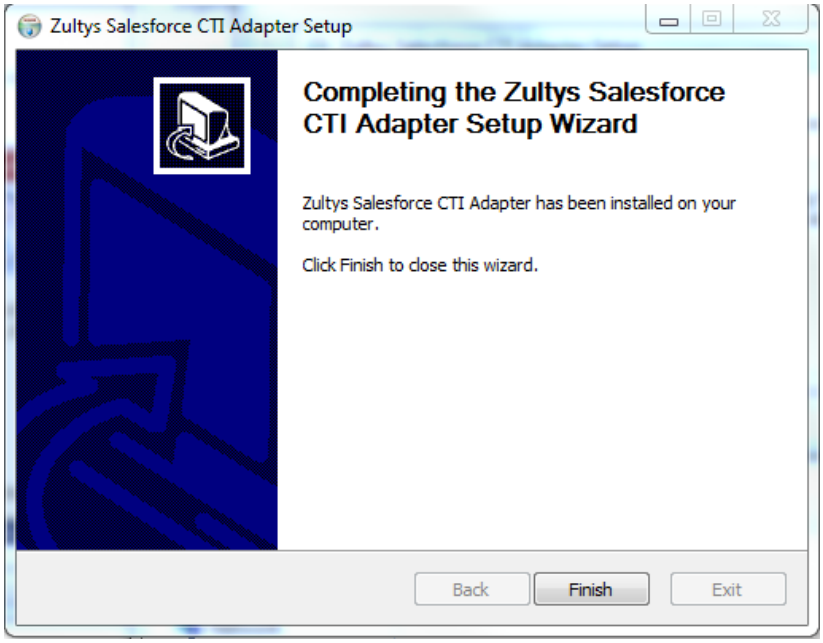
Zultys Salesforce CTI Adapter Setup
Completing the Zultys Salesforce CTI Adapter Setup Wizard
Zultys Salesforce CTI Adapter has been installed on your computer.
Click Finish to close this wizard.
Back
Finish
Exit

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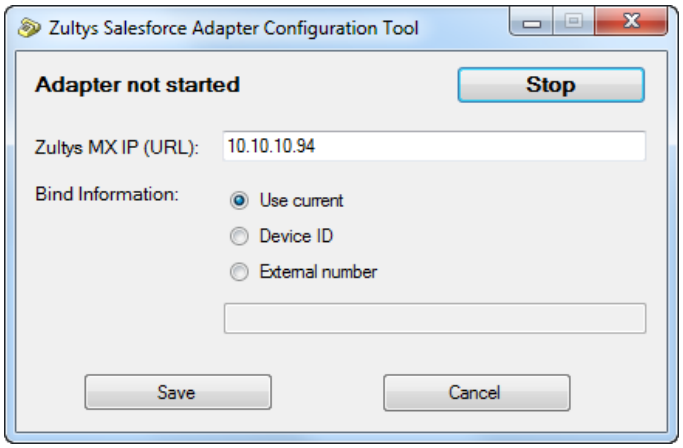
2.2 Configuring Zultys Salesforce Communicator

1. After installation of the Zultys Salesforce Communicator, the setup software creates a *Salesforce Communicator* folder. Click on **Config Tool** in the folder.

   A Zultys Salesforce Communicator Configuration Tool window opens.



2. Type the **IP address** of the MX. This entry is required only the first time that the **Config Tool** is opened. The IP address will be stored on the PC.

3. In the *Bind Information* section, select the option for your bound device.

   Use Current binds Salesforce Communicator to the same device that is already used as the bound device by MXIE or other client application. If no active bindings are available then Salesforce Communicator binds to a device assigned to the user by system's administrator.

   If *Device ID* or *External Number* is selected, valid device ID or phone number must be entered below for the binding to be completed.

4. Click on **Save.** A window indicates that the configuration has been saved. To start the Salesforce Communicator Adapter, click the Start button.

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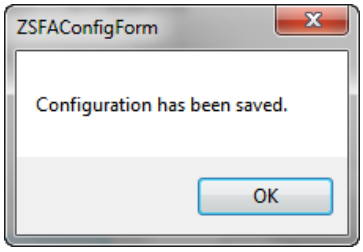

5. A Salesforce.com Communicator icon appears in the taskbar indicating that the software is running.

6. Right-clicking on this icon will display an *About* window providing Salesforce Communicator software information.

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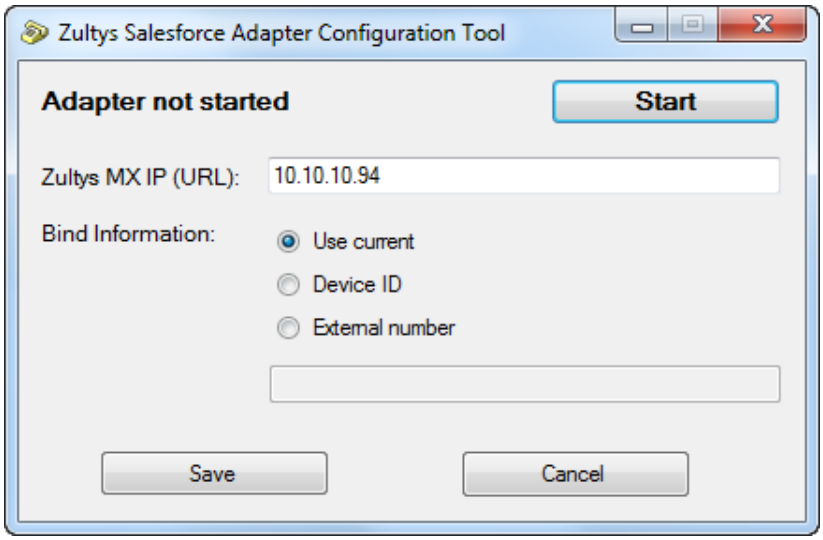
2.3 Stopping/Starting Zultys Salesforce Communicator

1. Click on **Config Tool** in the Salesforce Communicator folder.
2. The *Zultys Salesforce Communicator Configuration Tool* window opens and indicates if the Salesforce Communicator software is started.
3. To obtain successful Salesforce/MX integration, the Salesforce Communicator software must be started. If it is not, click on the **Start** button.



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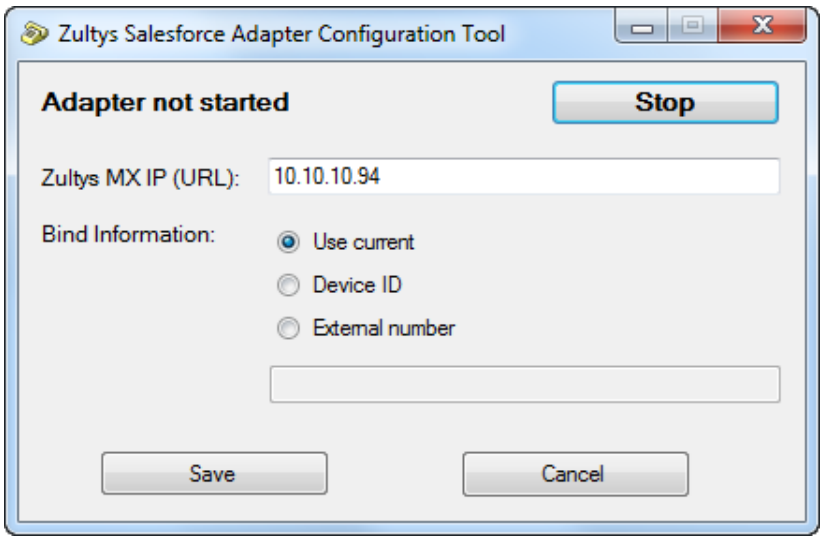
4. To stop the software, click on the **Stop** button.



5. To restore successful Salesforce/MX integration, the Salesforce Communicator software must be restarted.

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3 Running Salesforce with Zultys MX

1. Click on the

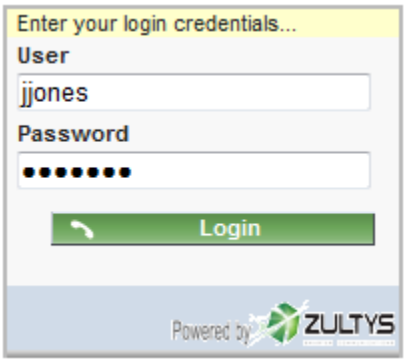
link or on the *Run Adapter* command in the Salesforce Communicator folder.

2. The Zultys Salesforce Communicator icon appears in the system tray.

3. Verify that the Salesforce Communicator software is running using the **Config Tool** (*see Section 2.3*).

4. Using an appropriate Web browser, log in as a user to the Salesforce.com CRM.

5. A Zultys Salesforce Communicator pane opens in the left pane of the Salesforce window. If this is the agent's first login, the pane appears as below. Enter the agent's **Zultys *MX*** log-in information. The log-in is stored on the agent's computer and will not be requested again.



User: Is your MXIE User name

Password: is your MXIE password

6. A scanning green bar in the pane indicates that a connection is being made between Salesforce and the MX.

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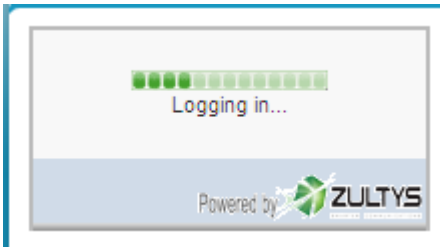
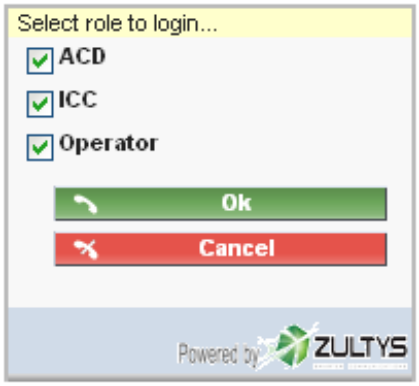
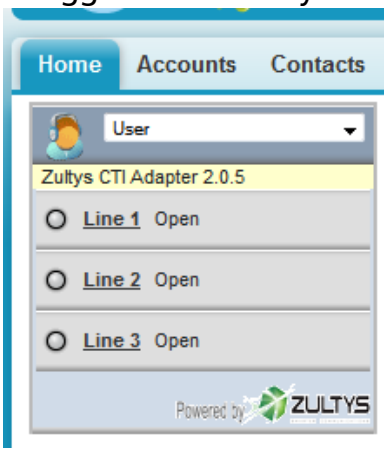


7. When connectivity is achieved, the Select Role to Login screen appears.



8. Select the checkboxes for roles to log in as and press **OK**.
9. The pane appears as below, and a gray indicator signals that the line is open.

Note: The roles that a user is logged in as are synchronized between MXIE and



Salesforce Communicator. For example: if an Agent is logged into an Operator role in MXIE and later deselects this role while logging into Salesforce Communicator, the agent will also be logged out of their Operator role in MXIE.

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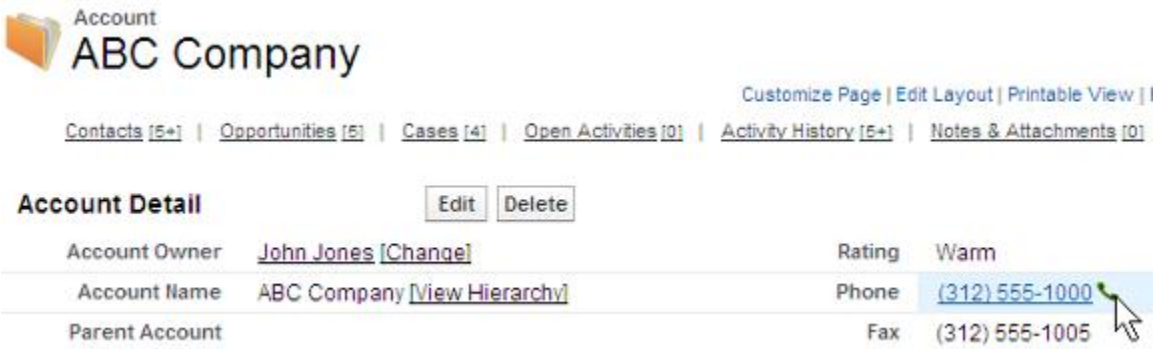
4 Making a Call within Salesforce

4.1 Using an Existing Account

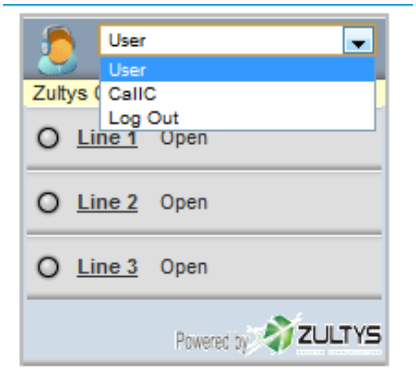
1. Display the Account or Contact screen.



2. Click on phone icon next to phone number.
3. The MX will call the agent's bound phone.
4. When the phone is answered by the agent, then the MX will complete the call.

4.2 Using the Zultys Adapter Dial Pad

1. In the Zultys Communicator pane, click on an open line. A dial pad opens.
2. To switch the *Active Role* from which the call is made, right-click on the trop-down menu at the top of the Zultys pane and select a role.



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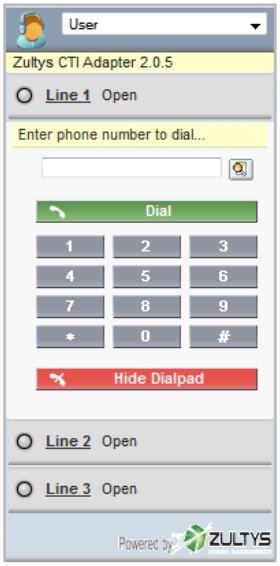
3. Enter the number being called.



4. The MX will call the agent's bound phone.
5. When the phone is answered by the agent, then the MX will complete the call.

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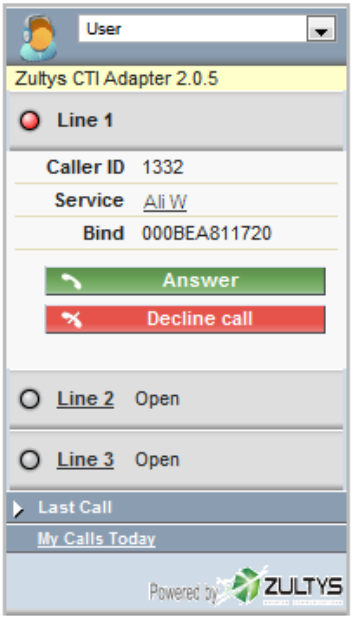
5 Receiving a Call within Salesforce

5.1 Accepting a Call

When a call is received, the Zultys Communicator pane displays the caller information, and the agent can either answer the call or decline it.



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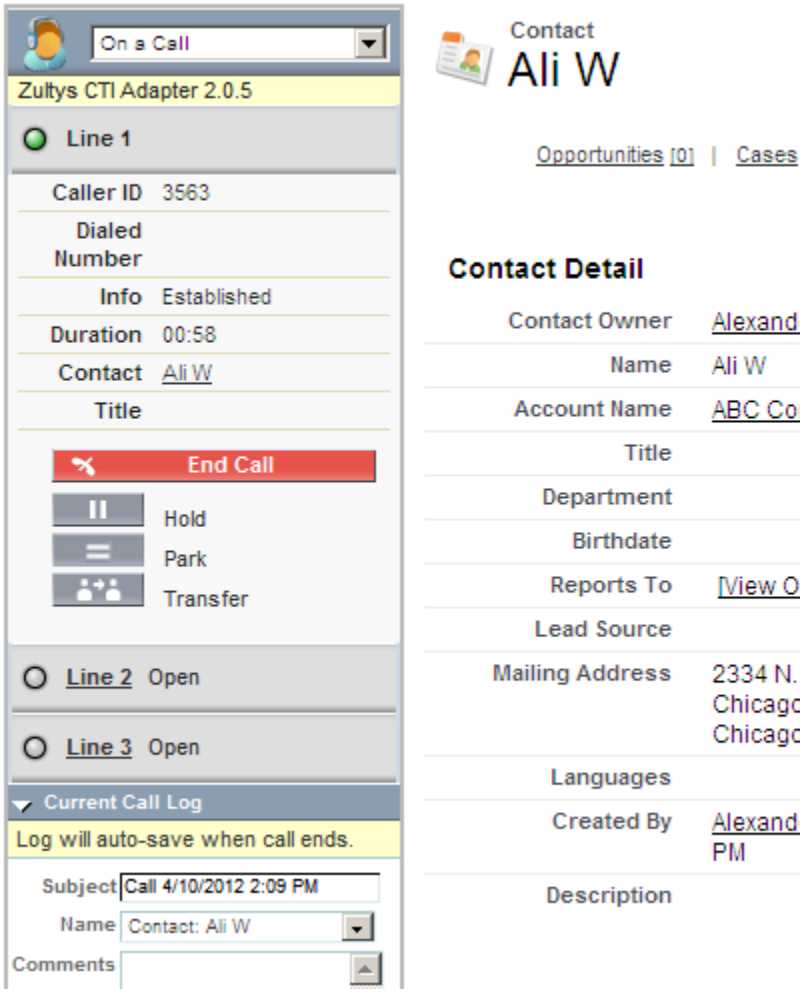
5.2 Contact Screen Pane

1. When a call is answered from a telephone number that is stored in the Contact database, the Salesforce Contact window automatically opens with the caller's contact information displayed.



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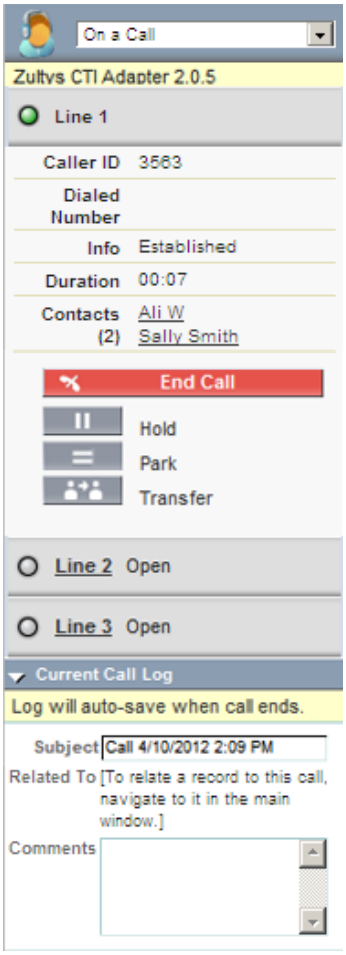
2. If the Caller ID is identified with more than one contact in the Salesforce Contact database, a list of contacts associated with that Caller ID will display in the Zultys Communicator pane.



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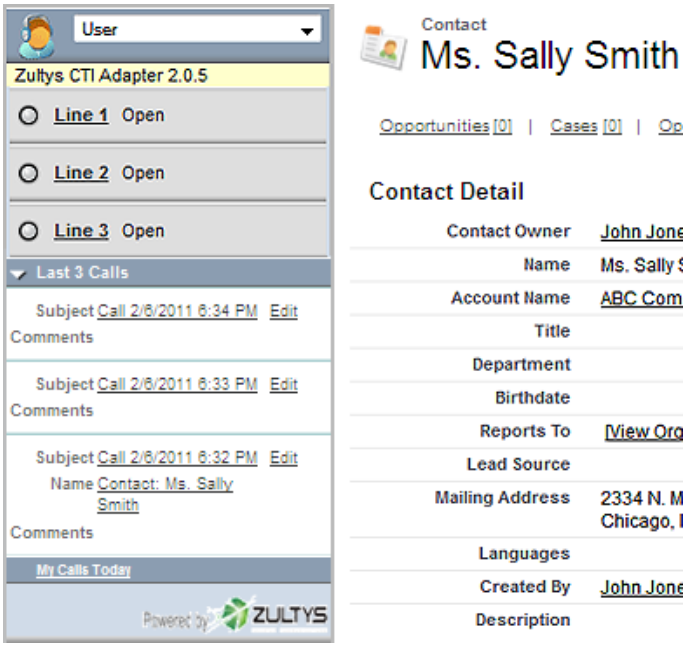
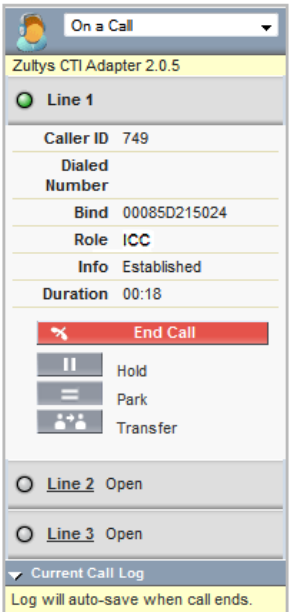
3. After answering the call, clicking on the appropriate caller's name opens that caller's contact window.



4. If there is no Caller ID match in the Contact database, the agent can create a new Salesforce Contact page and save the Zultys Communicator call Log to the new contact.



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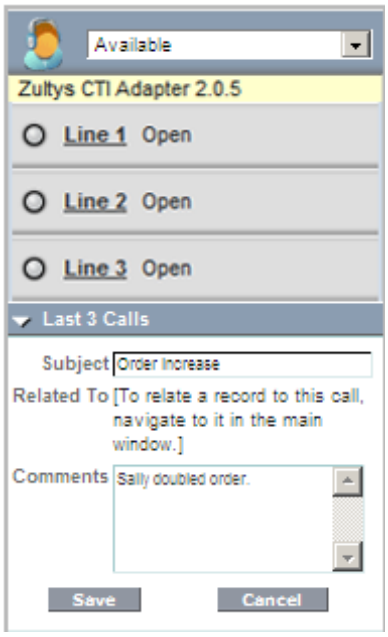
5. After call completion, comments can be entered and they will be saved in the Salesforce Contact's database record for future reference.



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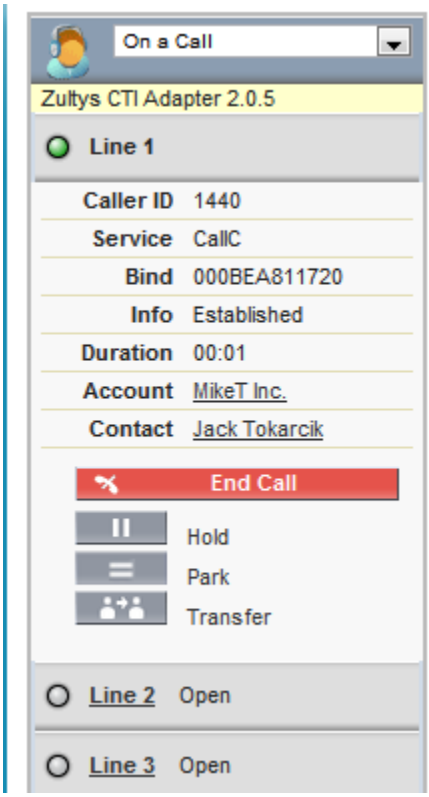
6 Call Control

The Zultys Salesforce Communicator pane presents control buttons for ending the call, putting it on hold, parking and transferring it.



6.1 Ending Call

Click on the **End Call** button.

6.2 Putting Call on Hold/Retrieving Call

1. To place the call on hold, click on the **Hold** button.
2. The call is put on hold, and the control button changes to a **Retrieve From Hold** button.

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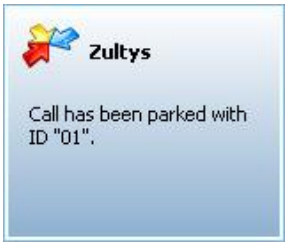
3. To retrieve call, click on the **Retrieve From Hold** Button.

6.3 Parking a Call/ Retrieving a Parked Call

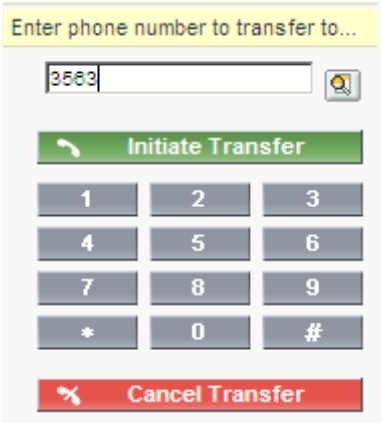
1. To park a call, click on the **Park** button.
2. A popup message appears in the corner of the screen with the Park ID.



3. To retrieve a parked call, click on an open line. A dial pad opens.
4. Dial the Park Server followed by the Park ID and press the **Dial** button.
5. The MX will call the agent's bound phone.
6. When the phone is answered by the agent, then the MX will complete the call.

6.4 Transferring Call

1. To transfer the call, click on the **Transfer** button.



2. The transfer dial pad appears.

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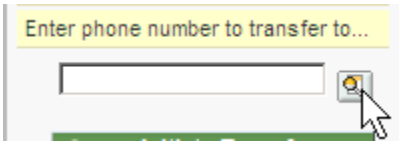
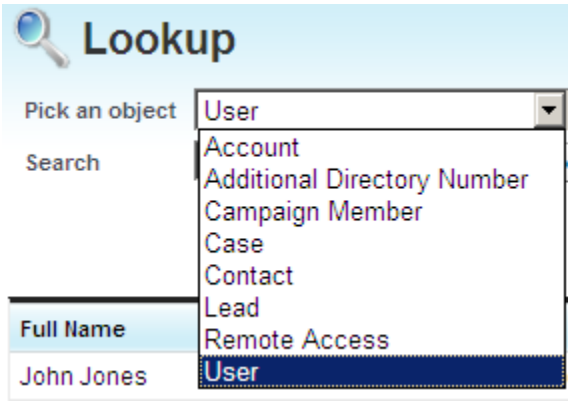
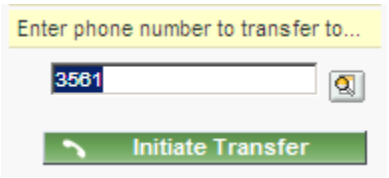
3. Enter the transfer number either by keying it directly into the phone number window or by clicking on the dial pad keys.
4. Alternatively, the transfer number can be retrieved from the Salesforce database. Click on the Lookup icon next to the phone number window.



5. The Salesforce Lookup window opens.



6. Conduct a search.
7. Click on phone icon next to the identified party.
8. That person's number is automatically entered into the phone number window.



9. Click on the **Initiate Transfer** button. Call is transferred.

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Administrator Manual

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7 Salesforce Administrator's Setup

7.1 ZSFA.XML file

The ZSFA.xml file is automatically copied to the user's PC when installing the Zultys Salesforce Adapter. By default on Windows 7 (64 bit) machines, the ZSFA is installed at:

C:\Program Files (x86)\Salesforce.com\Zultys Salesforce CTI Adapter

The file is titled "ZSFA.xml." You can copy this file to import the Salesforce.com call center.

7.2 Creating a new call center

If the Zultys Call Center has not yet been established, you must create one. The easiest way to establish a Zultys Call Center is to import the Call Center Definition file. A call center definition file specifies a set of fields and values that are used to define a call center in Salesforce for a particular CTI adapter. Salesforce uses call center definition files in order to support the integration of Salesforce CRM Call Center with the Zultys MX. The first instance of a call center record for a particular CTI adapter must be defined by importing the adapter's call center definition file. Subsequent call centers for a CTI adapter can be created by cloning the original call center record.

A call center corresponds to a single instance of a CTI system at your organization.

To create your first call center for a CTI adapter:

1. In Salesforce, click Your Name -> Setup -> Customize -> Call Center -> Call Centers.

   The Introducing Salesforce CRM Call Center splash page appears.

2. Click **Continue**.

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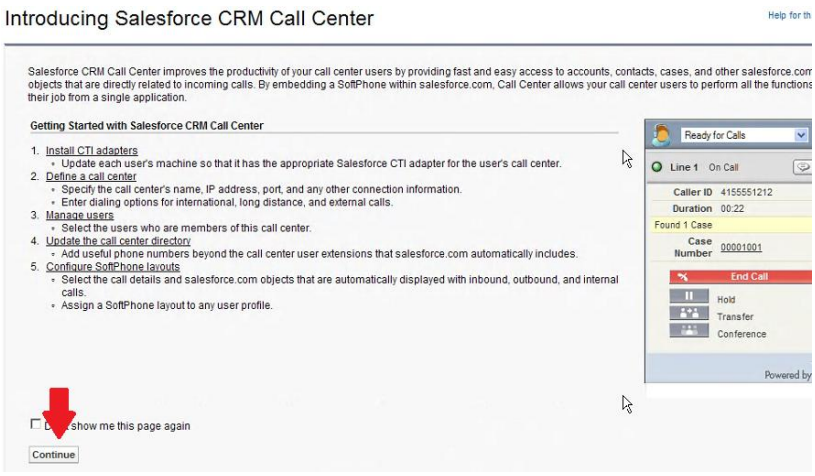
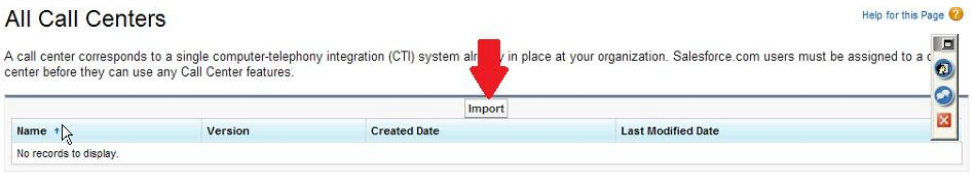
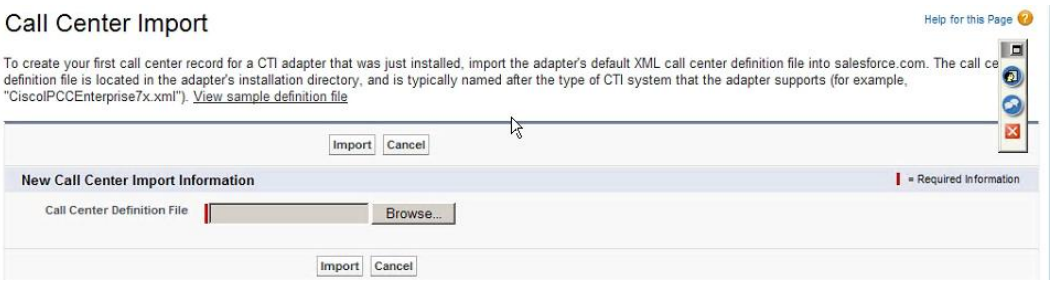

Introducing Salesforce CRM Call Center
Help for th
Salesforce CRM Call Center improves the productivity of your call center users by providing fast and easy access to accounts, contacts, cases, and other salesforce.com objects that are directly related to incoming calls. By embedding a SoftPhone within salesforce.com, Call Center allows your call center users to perform all the functions their job from a single application.
Getting Started with Salesforce CRM Call Center
1. Install CTI adapters
• Update each user's machine so that it has the appropriate Salesforce CTI adapter for the user's call center.
2. Define a call center
• Specify the call center's name, IP address, port, and any other connection information.
• Enter dialing options for international, long distance, and external calls.
3. Manage users
• Select the users who are members of this call center.
4. Update the call center directory
• Add useful phone numbers beyond the call center user extensions that salesforce.com automatically includes.
5. Configure SoftPhone layouts
• Select the call details and salesforce.com objects that are automatically displayed with inbound, outbound, and internal calls.
• Assign a SoftPhone layout to any user profile.
Ready for Calls
Line 1 On Call
Caller ID 4155551212
Duration 00:22
Found 1 Case
Case Number 00001001
End Call
Hold
Transfer
Conference
Powered by
show me this page again
Continue

3. Click **Import**.


All Call Centers
Help for this Page
A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to a call center before they can use any Call Center features.
Import
Name
Version
Created Date
Last Modified Date
No records to display.

4. Next to the Call Center Definition File field, click Browse to navigate to the ZSFA installation on a user's PC. This XML file is named after the type of CTI system that the adapter supports. For example, the MX's adapter's default call center definition file is named ZSFA.xml. Click Open to enter the path in the Call Center Definition File field.


Call Center Import
Help for this Page
To create your first call center record for a CTI adapter that was just installed, import the adapter's default XML call center definition file into salesforce.com. The call center definition file is located in the adapter's installation directory, and is typically named after the type of CTI system that the adapter supports (for example, "CiscoIPCCEnterprise7x.xml"). View sample definition file
Import
Cancel
New Call Center Import Information
= Required Information
Call Center Definition File
Browse...
Import
Cancel

5. Click **Import**.

6. If you need to make any additional changes, click **Edit** next to the name of the new call center.

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7.3 To create additional call centers for a particular CTI adapter

1. In the Call Centers list page, click the name of a call center that uses the same CTI adapter as the call center that you want to create.
2. Click **Clone**.
3. Specify a unique value for Internal Name. This name identifies the new call center record in Salesforce and is limited to 40 alphanumeric characters. It must start with an alphabetic character.
4. Make any additional changes to the new call center as necessary.
5. Click **Save**.

7.4 Enabling an Existing Call Center for a user

To enable Salesforce Communicator on your MX IP phone system, users need to be assigned to a specifically created Zultys **Call Center.** The Salesforce Call Center does not have any association with MX user/call group assignment, or creation of a call group on the MX.

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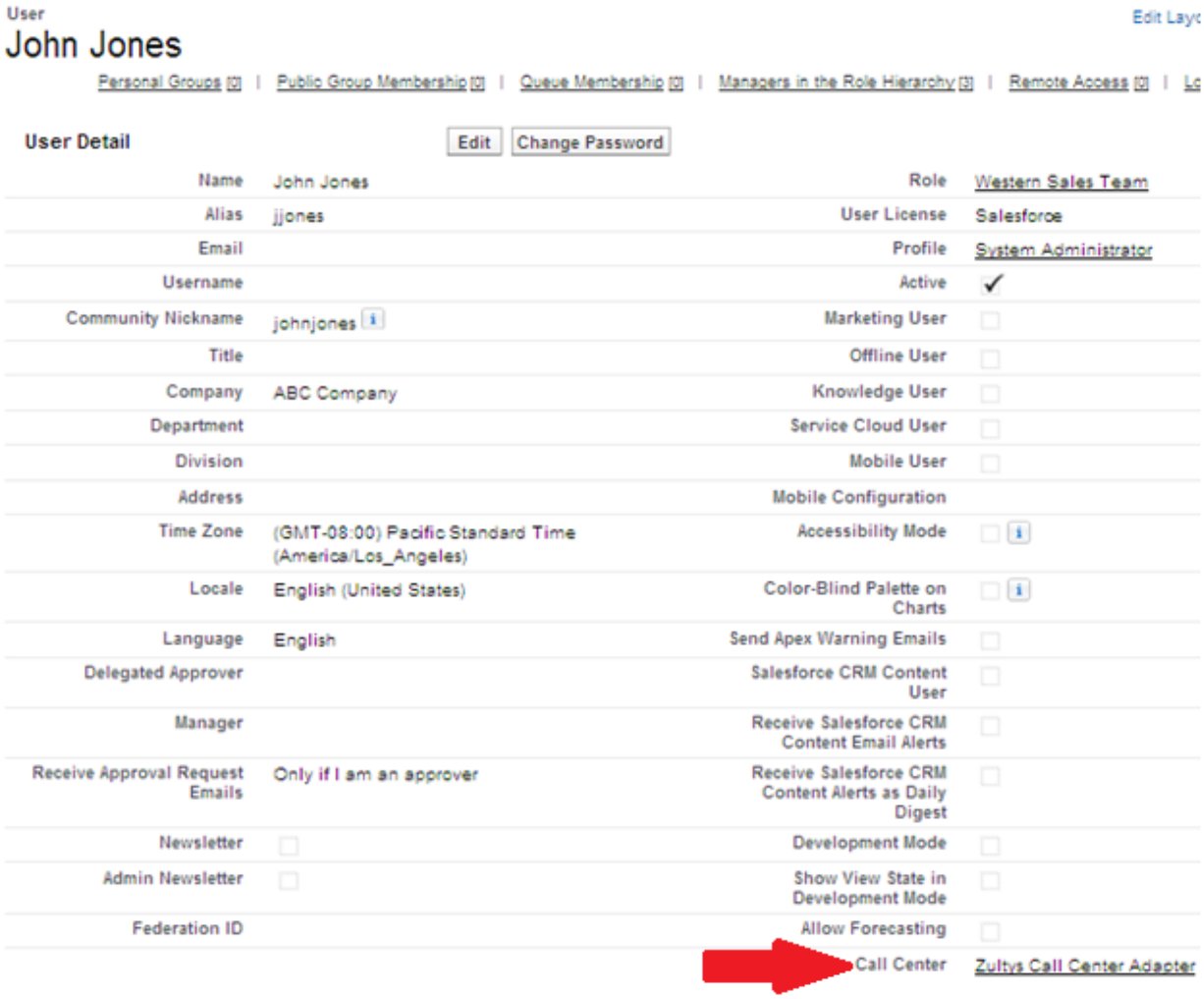

7.5 Modifying an Existing Call Center

If you are upgrading from Version 1 of the ZSFA to Version 2, it is recommended to create a new call center using the above process and assign the newly created call center to the users.

It is not recommended, or supported, to modify existing call center integrations to enable ZSFA. See *Section 7.3* for instructions on how to create an additional call center.

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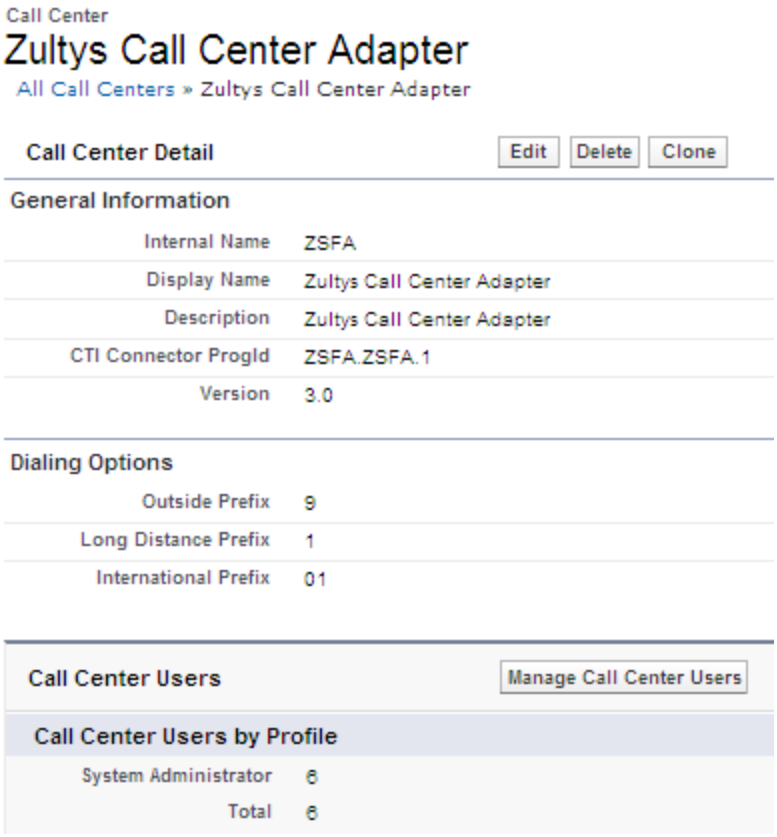

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8 MX Administrator Setup

8.1 MX requirement

Zultys MX firmware version 7.0.5 or higher should be installed and MX port 7778 should be opened.

8.2 Create a Certificate

In order for the MX to communicate with Salesforce.com, it must have an installed digital security certificate and user profile should be enabled for CRM access.

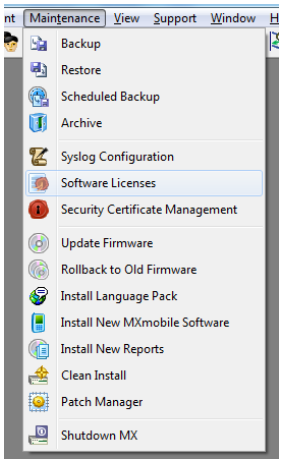
8.3 Enable CRM Access

To support Salesforce integration, 'CRM Access' feature of User Profile in MX Administrator should be enabled (see *Section 8.8* for more information).

8.4 Generating a Security Key

Generating a security Key is a precursor to generating any one of the certificate types.

1. In MX Administrator navigate to Maintenance -> Security Certificate Management.



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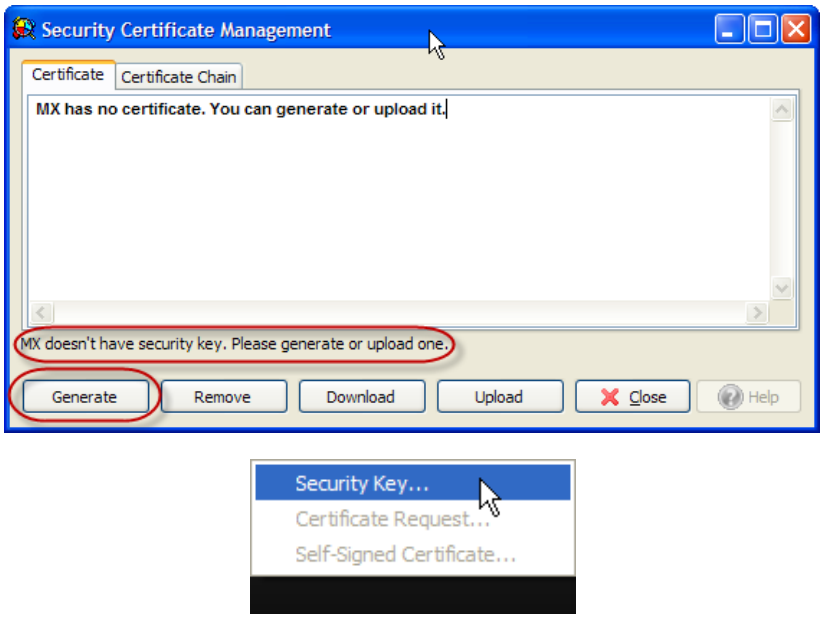
2. Select Generate -> Security Key.
3. Click on **Generate**, and select **Security Key** from the dropdown list.



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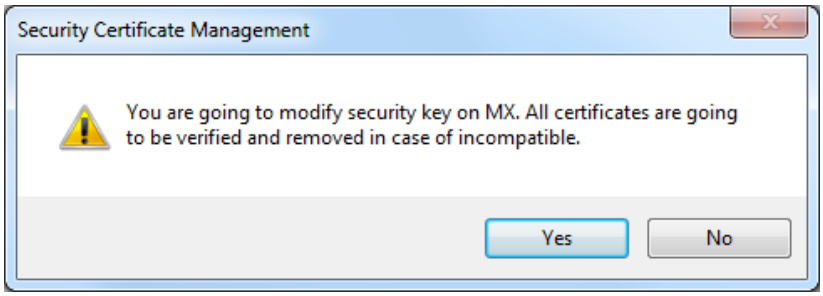
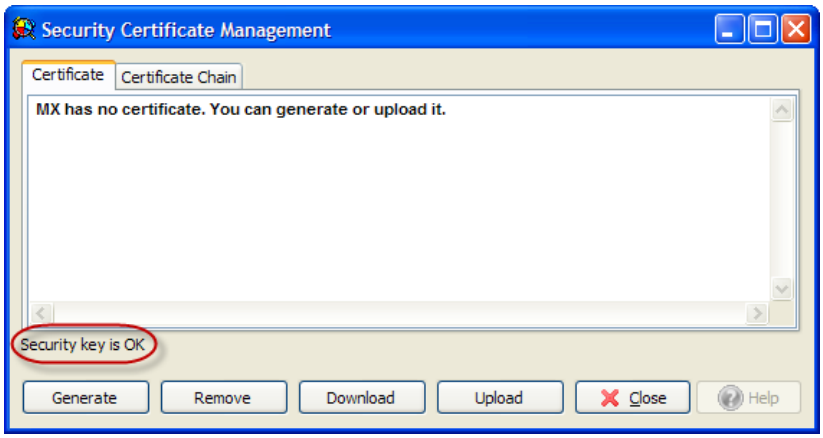
4. Click **OK** in the following popup message.


Security Certificate Management
You are going to modify security key on MX. All certificates are going to be verified and removed in case of incompatible.
Yes
No

5. Verify Security Key is successfully installed.

   Once the Key is generated, the screen updates to reflect this information



8.5 Generate and Install a Self-Signed Certificate

1. In MX Administrator navigate to Maintenance -> Security Certificate Management.

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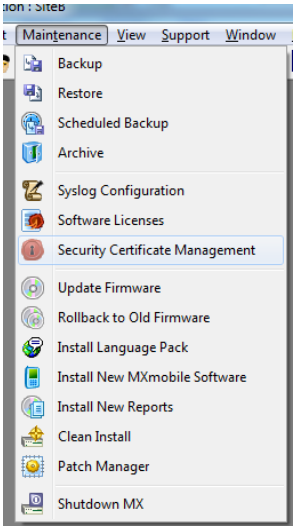
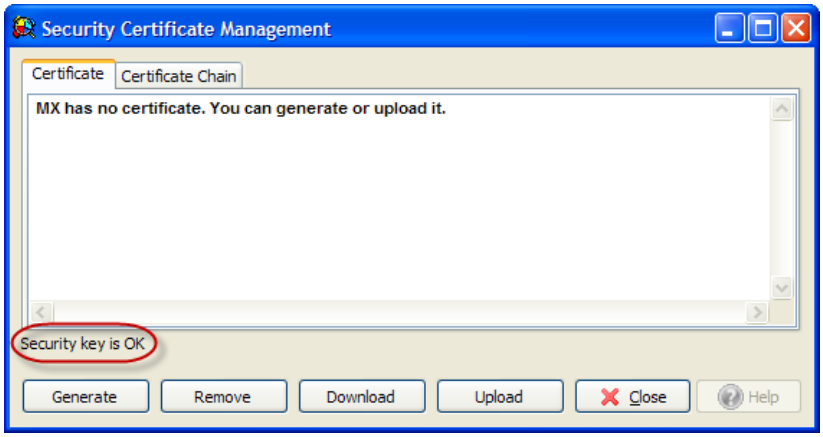


2. Generate Certificate.



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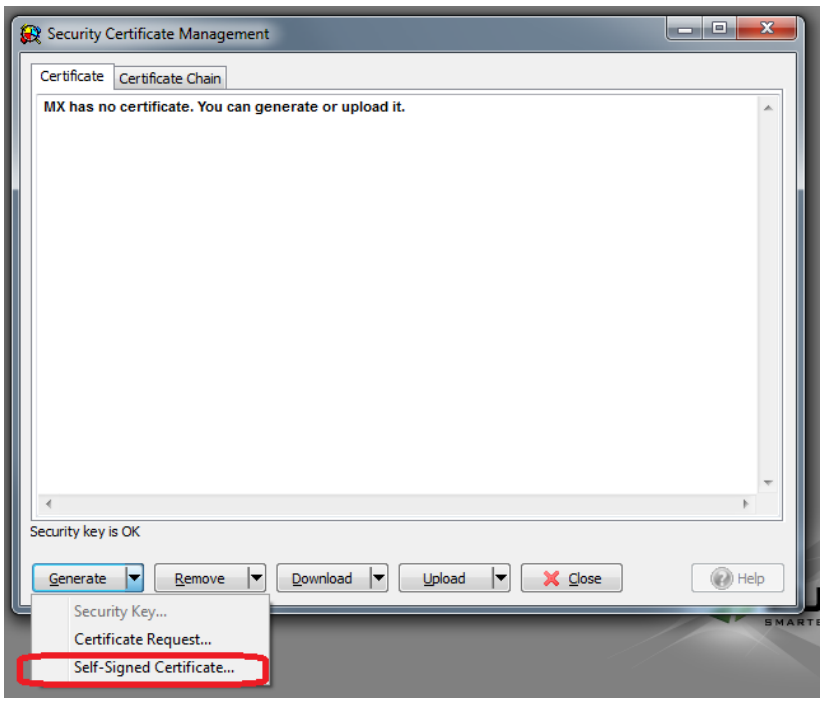
3. Select Generate -> Generate Self-Signed Certificate.



4. Complete the form with necessary information.

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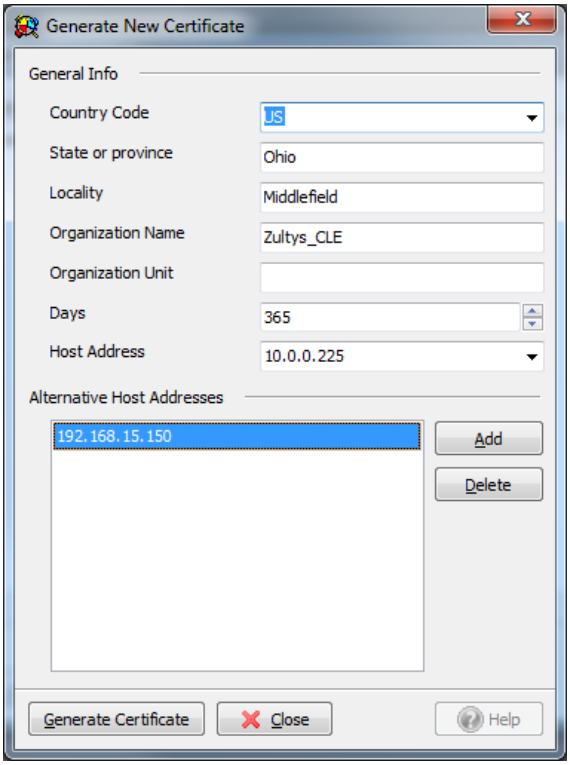
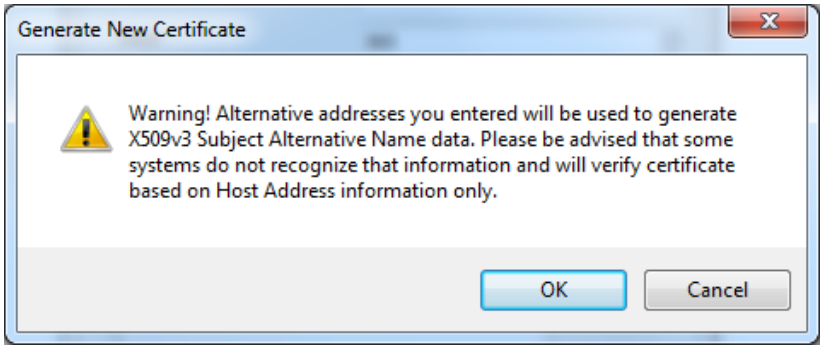


5. Click **Generate Certificate**.
6. Click **OK** to the warning popup up message.


Generate New Certificate
Warning! Alternative addresses you entered will be used to generate X509v3 Subject Alternative Name data. Please be advised that some systems do not recognize that information and will verify certificate based on Host Address information only.
OK
Cancel

7. Click **OK** in the confirmation popup message.

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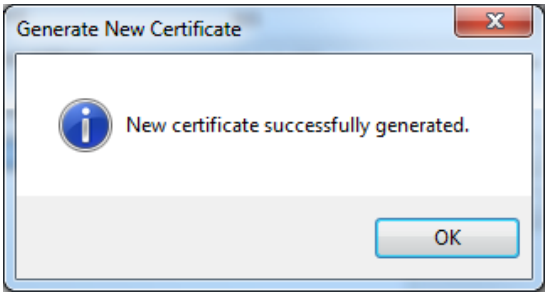
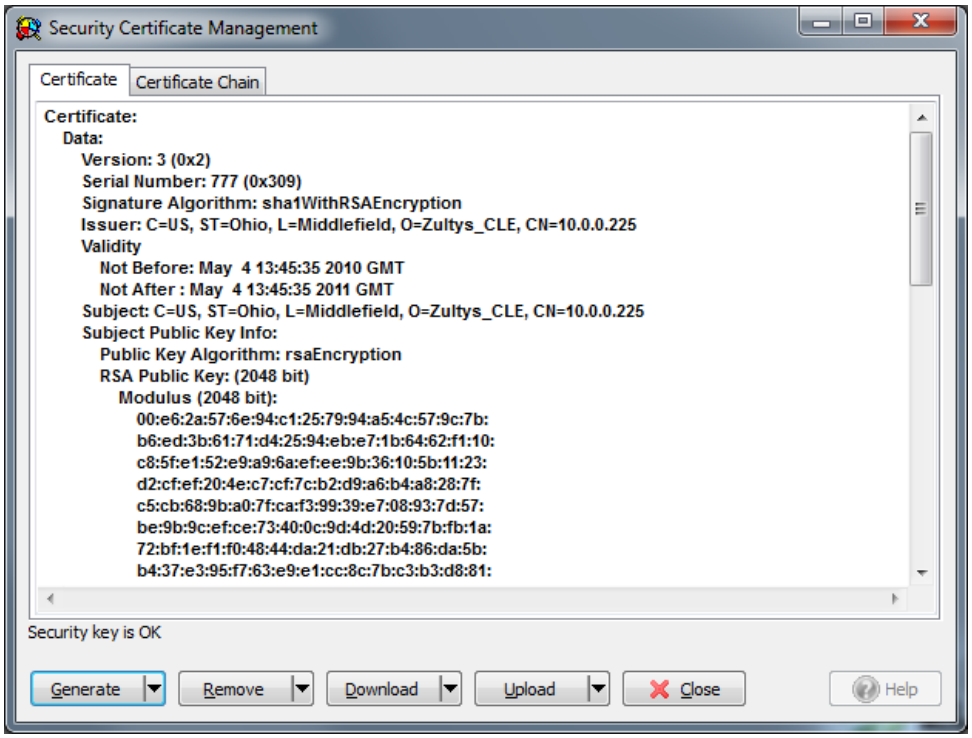


8. Click **Close**.



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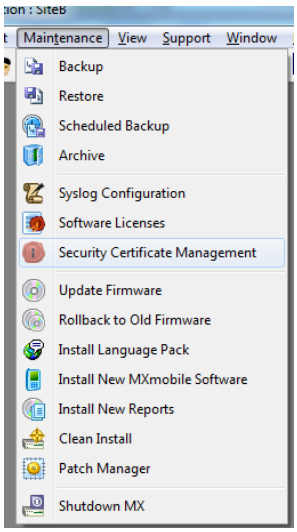
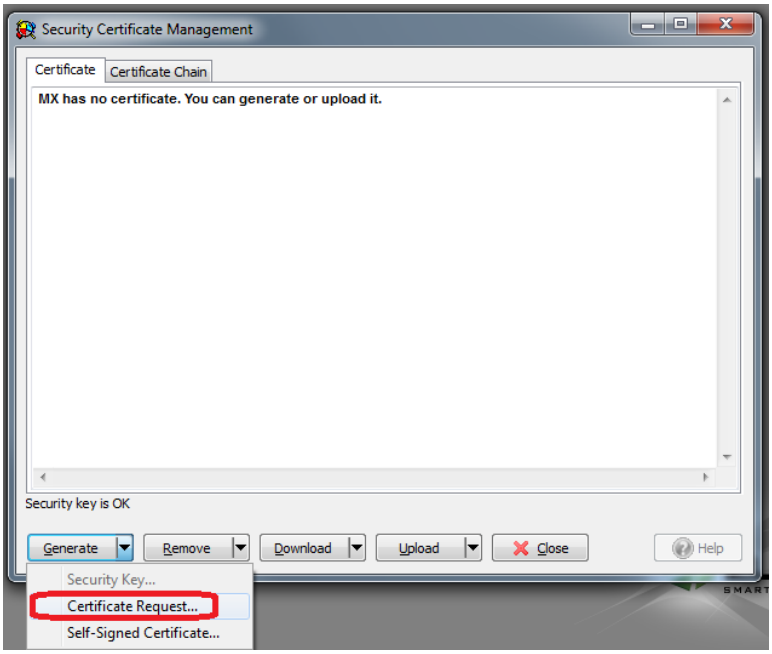
8.6 Generate a Request for a Certificate from a Certificate Authority

1. In MX Administrator navigate to Maintenance -> Security Certificate Management.



2. Generate a Certificate Request.



3. Complete the form with necessary information.

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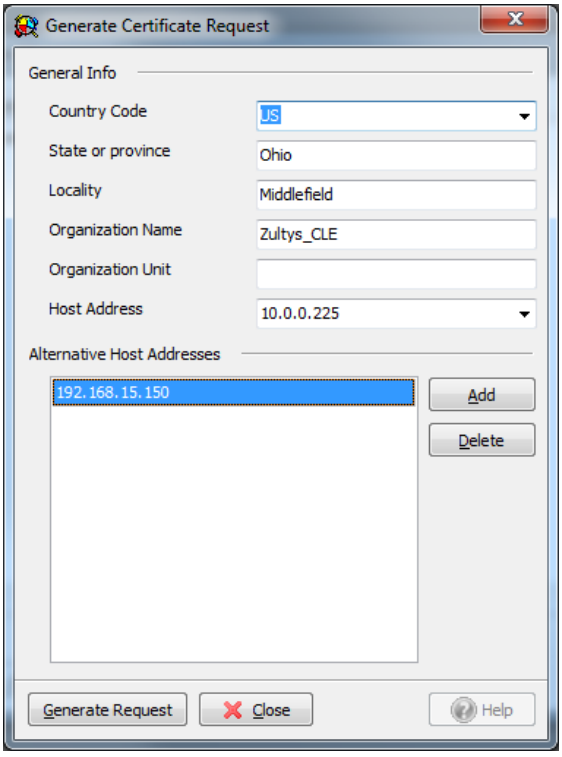
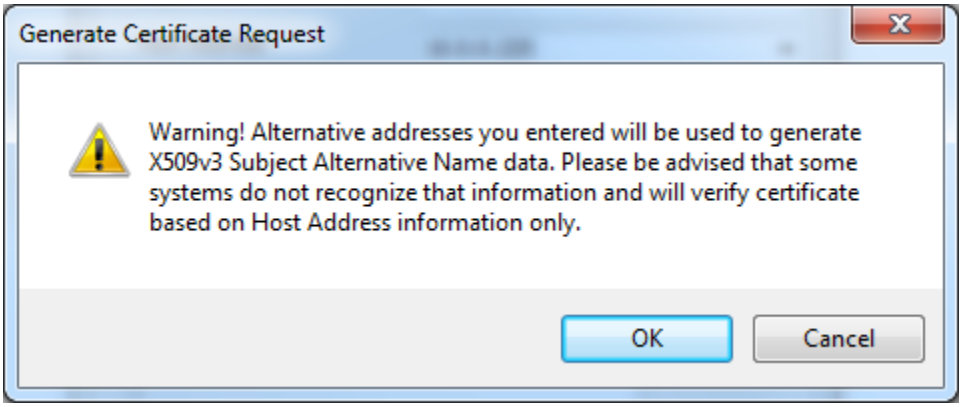


4. Click on Generate Request.
5. Click ok in the warning popup.


Generate Certificate Request
Warning! Alternative addresses you entered will be used to generate X509v3 Subject Alternative Name data. Please be advised that some systems do not recognize that information and will verify certificate based on Host Address information only.
OK
Cancel

6. Save generated Certificate Request.

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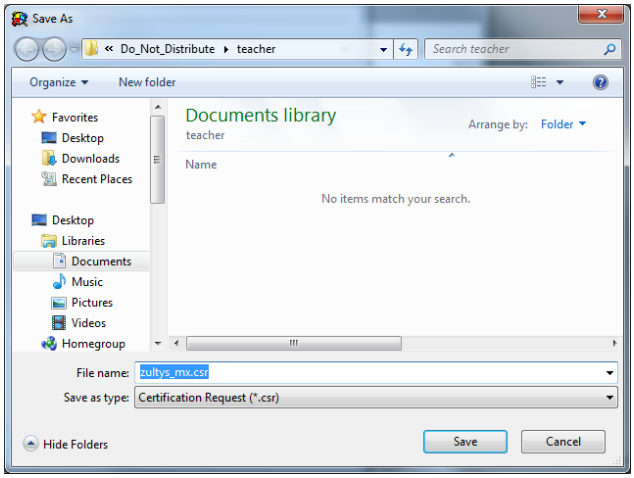
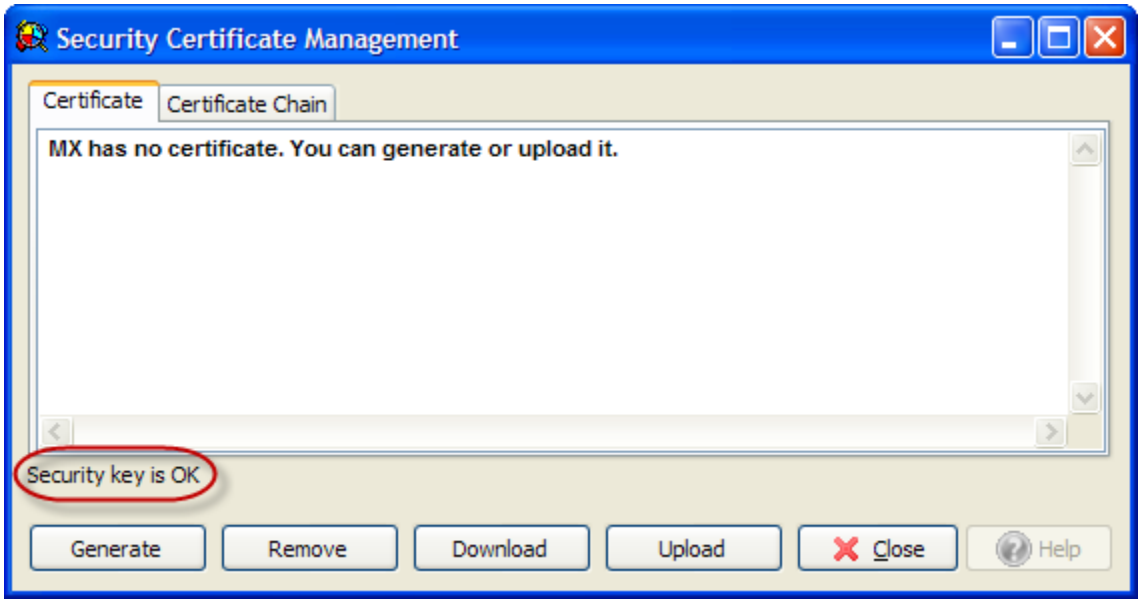


7. Purchase online a certificate from a Certificate Authority. When requested, upload the above CSR file.

8. The certificate authority will download your certificate.

8.7 Install a Certificate from a Certificate Authority

In MX Administrator navigate to Maintenance -> Security Certificate Management.



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8.7.1 Upload -> Certificate

1. Navigate to certificate file location and select.
2. Certificate is displayed. Check that data shown is correct.
3. If required, upload a certificate chain.

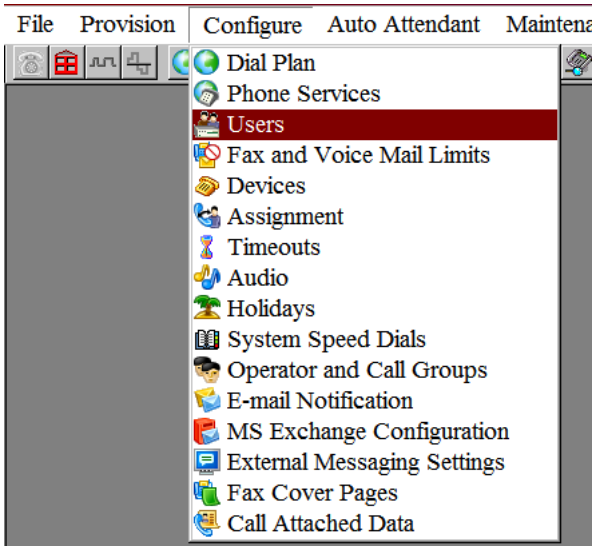
8.7.2 Upload -> Certificate Chain

1. Navigate to certificate file location and select it.
2. Mobile phone connectivity is now enabled.

8.8 Enable CRM User Access

For agents to integrate with Salesforce, the MX Administrator must ensure that the ***CRM User Access*** checkbox is checked within each agent's profile.

1. In MX Administrator navigate to Configure -> Users.



2. Select Users.
3. Click **Profiles** which is located at the bottom of the resulting screen.

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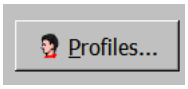
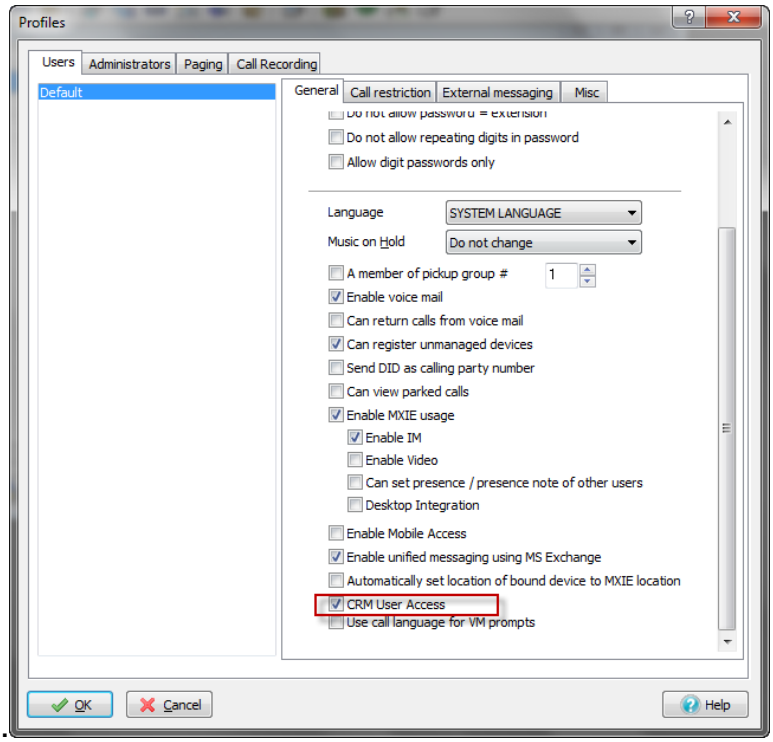


4. Select a profile of a Salesforce user from the list on the left side of the Profiles window



5. Scroll down the list of options on the right side of the window and checkmark **CRM User Access**.

6. Repeat step 5 for all the Profiles for users who use Salesforce Communicator Adapter.

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9 Troubleshooting

9.1 Agent is unable to install Zultys Salesforce Communicator software

Installer must have Microsoft Administrator privileges.

9.2 Zultys Salesforce Communicator does not initialize

- Check within the **Configuration Tool** that the Salesforce Communicator software is started and it displays the correct IP address of the MX.
- Make sure port 7778 is open.
- Make sure the certificate is valid.
- Make sure 'CRM Access' is enabled in User Profile section of Zultys MX Administrator.

9.3 Zultys Salesforce Communicator Log-In Failed

Check that your MX user login information is correct.

9.4 Call does not appear in the Zultys Salesforce Communicator pane window

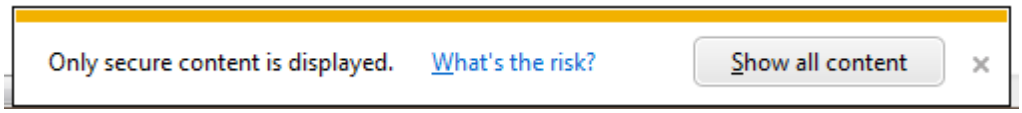
Check that the Zultys Salesforce Communicator software is running.

9.5 The Click-to-Dial feature in Salesforce is disabled

Check that the Zultys Salesforce Communicator is running.

9.6 Disabling Mixed Content Messages in Internet Explorer 9

In Internet Explorer 9 a popup warning about "Mixed Content" is displayed.



1. Click on the Gear-like toolbar icon in the top-right corner of the Internet Explorer 9. Select **Internet Options** from the popup menu.

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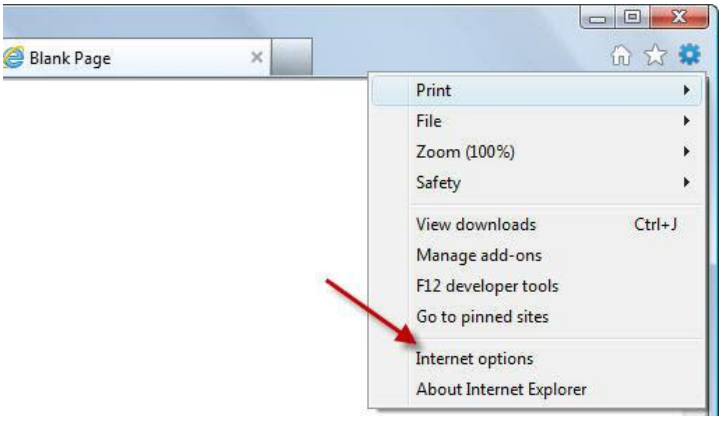
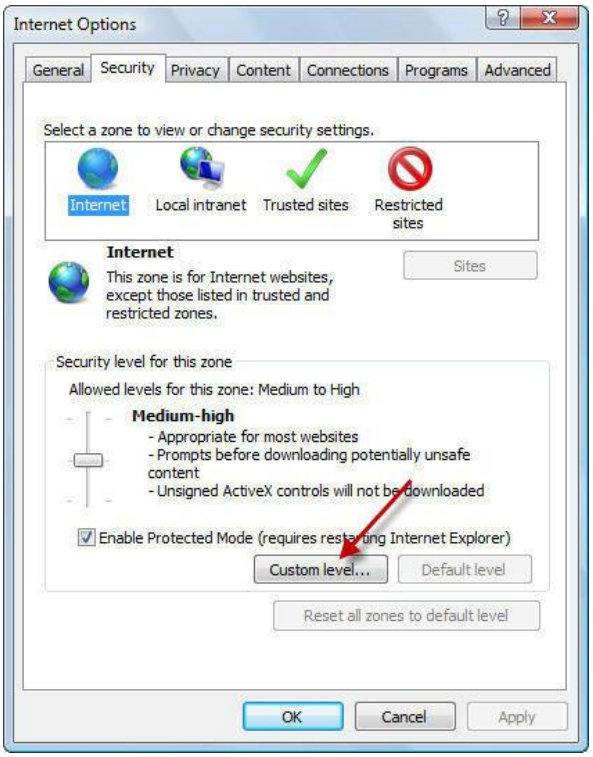


2. In the **Internet Options** window, select the **Security** tab.
3. Click on the **Custom level...** button while the **Internet** zone is selected.



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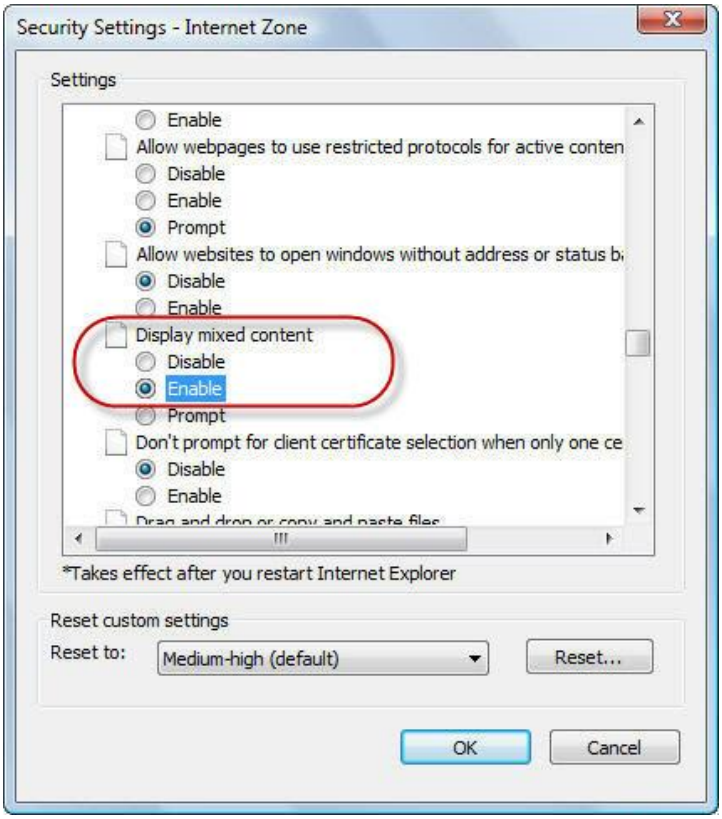
4. Scroll down the list of options and select **Enabled** for the **Display mixed content**.



5. Click **OK** twice to save the settings and close all of the options windows.

It is suggested to do this for Internet, Local intranet and Trusted sites.

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